

## ITC Jan 2012 – Media

### Adventures in Living Update

My ID featuring “JibJab”: Approved last March, Launched in Travel Guide

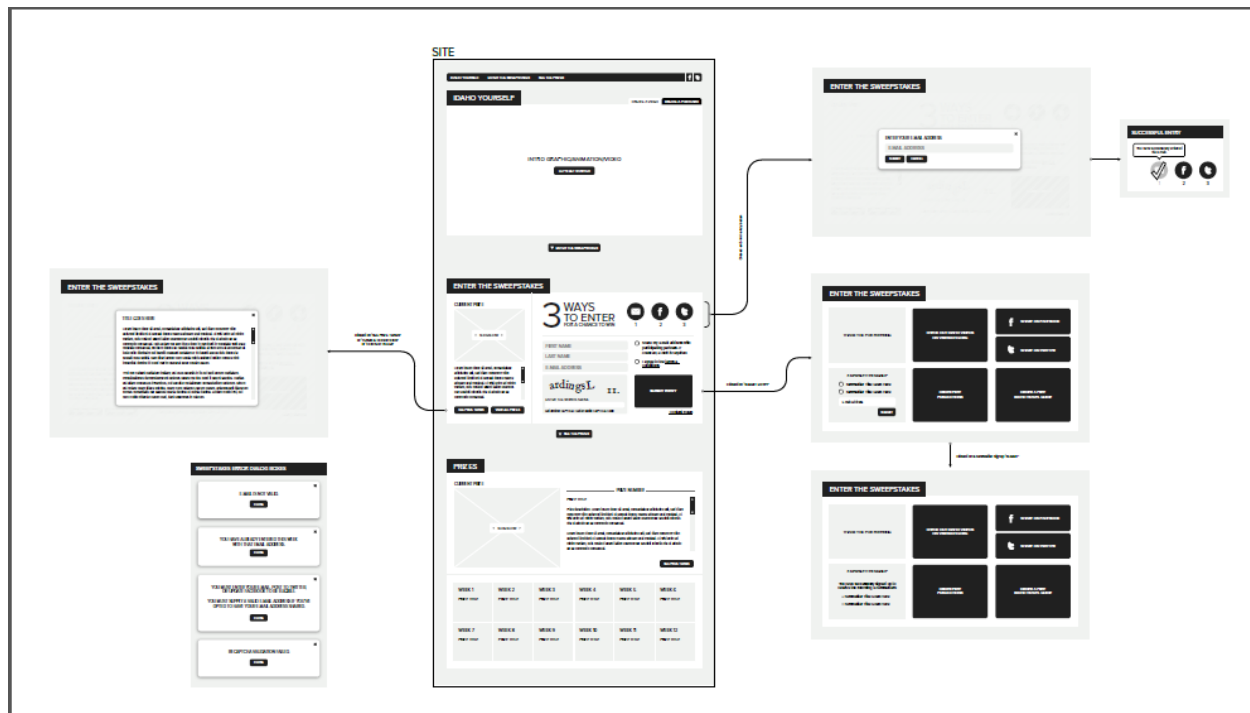
Media roll-out in March

Site goes live April 2

- Three My ID videos
- 1<sup>st</sup> screening today: Are we There Yet?. Action, Romance
- Send-able e-postcards
- Integrated into VisitIdaho.org

Weekly offers thru Aug ‘12

- All travel regions represented
- Contest entry via email, Facebook, Twitter
- Lodging, activity vouchers, gift certs



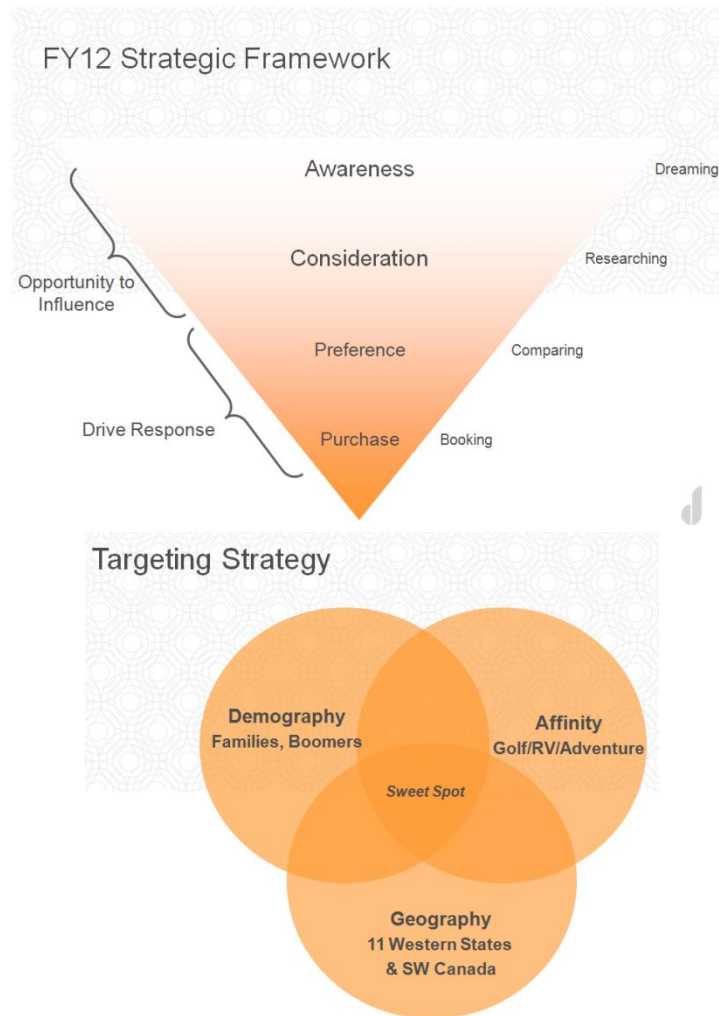
### FY12 Media Overview

#### Media Objectives

- Increase lodging tax collections by 5% by June 30, 2012.
- Increase awareness & interest among the target audiences to travel to Idaho.
  - ✓ Measured by total # of inquiries, collateral requests, phone calls and website visitation
  - ✓ Increase by 15% by June 30, 2012
- Showcase Idaho's diverse tourism product, including travel regions, prime season activities, scenic beauty, infrastructure, etc.

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## Media Strategy

### Consideration process

- Mix of ads to ensure frequency & visibility
- Align media with demography, geography and affinity goals to ensure adequate coverage of prioritized targets
- Use impartial evaluation process to ensure campaign goals are met

### Campaign strategies

- Media to match the primarily experiential online product
- Emphasis on interactive media
- Focus on being closer to the traveler, Planning & buying stages
- Rise in digital consumption, mobile & social

## Media Approach, Selection Criteria

Media selection based on RFP submissions using the following criteria: Geographic alignment, Demographic alignment, Affinity alignment, Cost efficiency/discounts/volume buys, Creative/visibility, Reach, Historical performance, Added value (links, emails, reader service), Editorial coverage, Non-profit match, Co-op potential, Integrated media platforms

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## Media Recommendations

Majority of budget to horizontal targets

11 western states, Comprehensive mixture of print & online, Reaches top active/lifestyle travelers,

No waste, **72.4% of media budget**

Heavy-up budgets for top vertical/niche markets

RV, Golf/Resort, Family, Adventure, Western WA/Seattle, Prime season co-ops/oppty ads,

**27.6% of media budget**

Horizontal Print. Print with digital added value: Families/mom, boomers, active travelers

Sunset Magazine (April & May), Cooking Light Magazine (May), 3 print ads total, \$176,642.35 print investment, **17.4% of total media budget**

Horizontal Online. Online, Facebook & Google Search: Families/mom, boomers, emerging markets

Sunset.com (\$29,411.76), Facebook (\$20,000), Google Search (\$35,000), iExplore (\$70,955.88), Trip Advisor (\$131,764.71), Quantcast Network (\$30,588.24), Pandora.com (\$88,282.35), Microsoft.com (\$135,947.91), EyeWonder (ad serving fees, \$15,000), \$556,950.85 online investment, **55% of total media budget**

## Niche Summary

RV: Print only: Trailer Life, Family Motor Coaching, Highways, western issues when available, \$39,675.88 investment, April – June, 3 ads total, 4% of total budget

Golf: Print with digital added value: Golf Digest, western editions, \$36,642 investment, May & June, 2 ads total, **3.6% of total budget**

Family: Print with online added value: Ladies Home Journal, western (April), Good Housekeeping, western (April), Woman's Day, western (May), 3 ads total, \$50,685.29 print investment, **5% of total budget**

Adventure: Print and online:

National Geo Traveler, western & national: May & June/July, 2 ads total, \$57,950 print investment

Outside, western: 1 ad in May, \$10,711 print investment

YellowstonePark.com: 1 ad in May, Leads & online program, \$34,752.94 investment, **10.2% of total budget**

Seattle: Print and online: SeattleTimes.com, KOMO.com, King 5.com, 425 Magazine (March/April & May/June), South Sound Magazine (April/May & June/July), Seattle Met (April & May), Seattle Magazine (May & June), 8 ads total, \$12,052.92 online investment, \$36,701.18 print investment, **4.8% of total budget**

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### Budget Summary

• Horizontal/11 Western	\$733,593.21	
• RV	\$39,675.88	
• Golf/Resort	\$36,642	
• Family	\$50,685.29	
• Adventure	\$103,413.94	
• W. Washington/Seattle	\$48,754.10	
• Domestic Co-op/Oppy	\$100,000	
• Production	\$150,000	
<b>Total Prime Media</b>	<b>\$1,012,764.42</b>	
<b>With Production/Co-op</b>	<b>\$1,262,764.42</b>	
<b>FY12 Budget</b>		<b>\$1,150,000</b>

## ITC January 2012 Winter and Agency

### Winter Update.

Vitamin ID Campaign, Drive visitation & sweeps IdahoWinter.org

- Launched 10.21.11: Sun, Bluebird days, Season-long offers
- \$250K media buy, with focus on Seattle

Ski Idaho Partnership

- Ski Fever show in Seattle (10.28 - 10.30)
- Retail promotion with Escape Outdoors & Microsoft store in Bellevue Square in 1.28.12
- Promos with Alaska Air
- Jan Learn to Ski/Board month
- Eblasts and social media channels

IdahoWinter.org

18,627 visits, 15,084 absolute unique visitors,

Top regions are WA, ID, CA, OR, Canada (Calgary, Vancouver, Edmonton)

VisitIdaho.org/winter

14,333 visits, 12,107 absolute unique visitors, Top regions are ID, WA, CA, OR

Sweep entries from Ski Fever Show

302, 75 opt-ins, HD camera giveaway

Sweep entries from IdahoWinter.org

Avg 300 – 650 per week, total 5,674 (1/9/12), 350 opt-ins per partner

Sweeps entries from General Growth Properties

Nationwide locations, 12,414 for SV package

### Ski Idaho Summary

Ski Idaho Website

New lodging properties: GuestHouse Inn, Aura Soma Inn, Teton Springs, Grangeville Super 8, Moose Creek

Engagement: Facebook – 31% up, Twitter – 20% up, You Tube – 239% up

E-newsletter reach & frequency

Distributed bi-monthly, 30K

Hot Lodging Deals clicks: Oct 2011 – 237, Nov 2011 – 187, Dec 2011 - 320

### General Update

- Visit Idaho mobile went live prior to holidays, visitidaho.org/m
- Updated online tourism press kit
- New State Highway Map
- Rebuilt lead generation process with statewide partners, including 511
- All FY12 domestic co-ops are complete
- New partnerships & media

## ITC Jan 2012 – Travel Guide

FY 12 Highlights: 136 pages, 140,000 printed, Kept GIG spread, New My ID ad, New MS Tag codes, Pano photography

### 2012 Financial Summary

- Overall sales down 16%
  - 2011 - \$100,542
  - 2012 - \$84,368
- IOGA sales down 18%
- Cost of Sales (cos) down 12%
- Margin cos grew to 30%
  - 2011 – 27%
- 3% cash discount used by 8 advertisers
- Decline in number of ads
  - 2011 – 47 paid ads with 9 filler/comps
  - 2012 – 45 paid ads with 17 filler/comps
- Net revenue down 24%
  - 2011 - \$77,342
  - 2012 - \$59,057

### 2012 Financial Report

#### Revenues

Direct gross sales	\$70,188
IOGA gross sales	\$14,180
	<b>\$84,368</b>

#### Less Cost of Sales

Commissions to other agencies	\$9,022
IOGA sales commission	\$2,127
Direct sales commission	\$4,218
3% cash discounts	\$235
IOGA rebate of 5%	\$709
Project mgmt fee	\$9,000
	<b>\$25,311</b>
<u>Net Revenue</u>	<b>\$59,057</b>

#### Production Expenses

• Printing, paper, shipping	\$105,693.21
• Design, copywriting	\$33,625
• Photo, layout, coordination	\$65,364.09
• Pre-print, press check	\$16,506.45
Total	<b>\$221,188.75</b>

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<u>Net cost to ITC budget</u>	<b>\$162,131.75</b>
Budget line item print	<b>\$167,575</b>
Budget line item digital	<b>\$12,425</b>
<u>Total Travel Guide Budget</u>	<b>\$180,000</b>

### 4 – year Comparison

	2009	2010	2011	2012
Net Revenues	\$102,445	\$76,556.10	\$77,342.24	\$59,057
Expenses				
• Print/paper	\$138,389	\$104,500	\$102,115.40	\$105,693.21
• Design/copy	\$20,725	\$31,925	\$28,153.40	\$33,625
• Photo/Coord/ layout	\$70,350	\$68,350	\$56,842.25	\$65,364.09
• Pre-print, prep	\$16,800	\$24,800	\$24,000	\$16,506.45
Total Expenses	\$246,264	\$229,575	\$211,111.05	\$221,188.75
Net cost to ITC budget	\$143,819	\$153,018.90	\$133,768.81	\$162,131.75

### Idaho Trends

Decline in ad revenue, number of ads & call volume over the last 6 years.

Content is clearly focused & optimized for online distribution.

VisitIdaho.org, Social media, TripAdvisor for planning, Digital flipbook (100-300 views per week),

New mobile site, Monthly Newsletters, Consumer & industry blogs

### Industry Trends

California: print guide, 204 pages, App

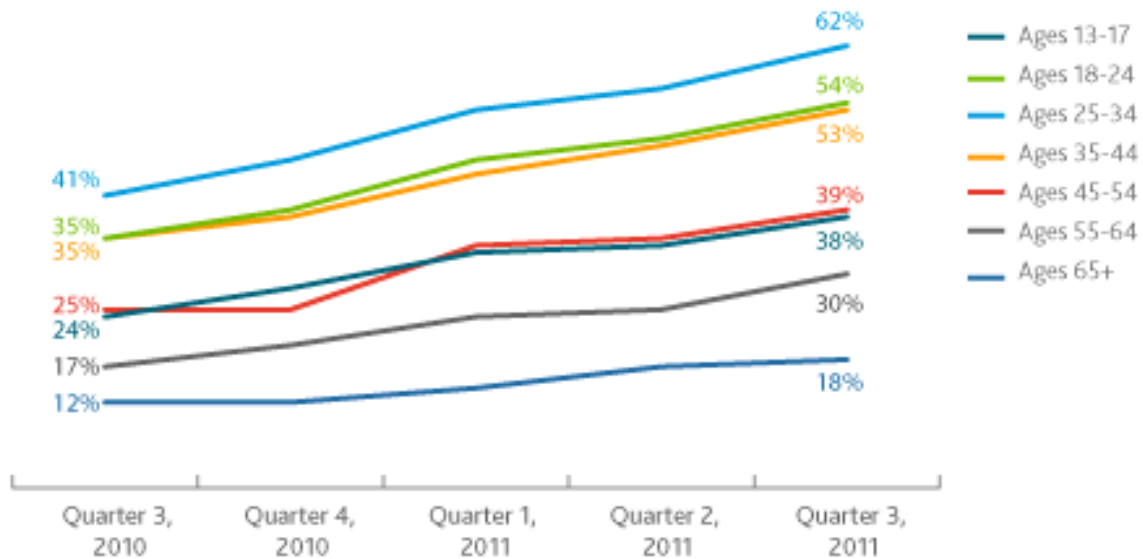
Montana: seasonal books, dropped listings, dropped advertising

Wyoming: print guide, digital flipbook, App



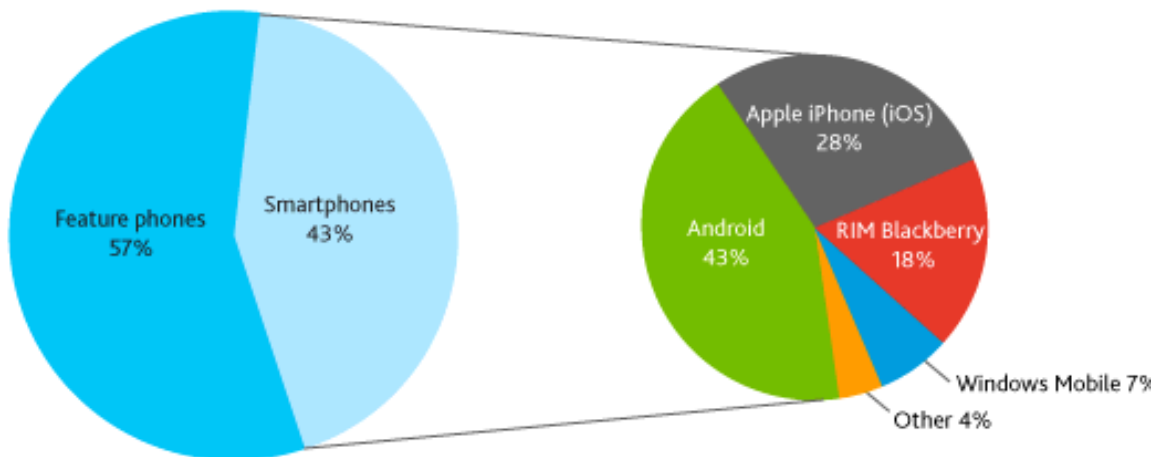
### Smartphone Penetration By Age Group

Q3 2010 - Q3 2011, U.S.



### Smartphone Penetration and OS Share

Q3 2011, U.S.



#### Post PC Era

By 2015, 82 million US consumers will own a tablet – Forrester Research May, 2011

Computing is shifting from: Stationary to ubiquitous, Formal to casual, Arms-length to intimate, Abstracted to physical

Tech innovations: Wi-fi and mobile broadband, Cloud services, Computing on the go, Real-time connectivity, Devices that work double-duty

#### FY12 Recommendations:

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- Move to a digital distribution model with a tablet & smart phone app
  - Apps & ad serving system will require a dedicated investment
  - Est new metrics for advertisers
  - Marketing plan
- Reduce print guide to sizzle piece
  - 48-52 pages
  - Print 80-90K
  - Remove listings & advertising
- Review budget, staff resources & industry impacts
- Evaluate production costs & potential savings
  - Paper, shipping, fulfillment, storage
- Cost prohibitive to produce print & digital guides w/o tapping additional budget

## **Pros**

- Sync communities in Idaho, mid-level adopter in national tourism market
  - Not first to market, still in growth phase
  - Tech costs have dropped
- Idaho-based partner for production
- Integrated into VisitIdaho & ad campaign
  - Helps create national awareness
  - Impacts SEO & Google rankings
  - Clear metrics & measurements
  - Tie into mobile site
  - Continue with online PDFs for printing
  - Increase ROI of video & photos assets
  - Reduce staff time, use UpdateIdaho
  - New revenue stream for Dept
  - Apps are free downloads
- FY12 savings + digital budget would seed funding for on-going development
- 6+ week development cycle
  - Configure existing print files
  - Multiple platforms & storefronts
  - Direct-to-device downloads, wi-fi not required
  - Spring My ID integration
  - Winter 2012 w/ Vitamin ID
- Share @ Grant Summit
- Full report @ March ITC meeting